



*The* INTERNATIONAL  
PROPELLER CLUBS  
*Italy*



## XIII INTERNATIONAL MISSION



Round Table | The new challenges for Shipping:  
forecasts and new port models

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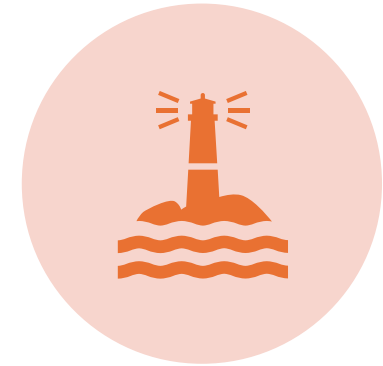
# Agenda



GLOBAL  
GEOPOLITICAL  
SCENARIO



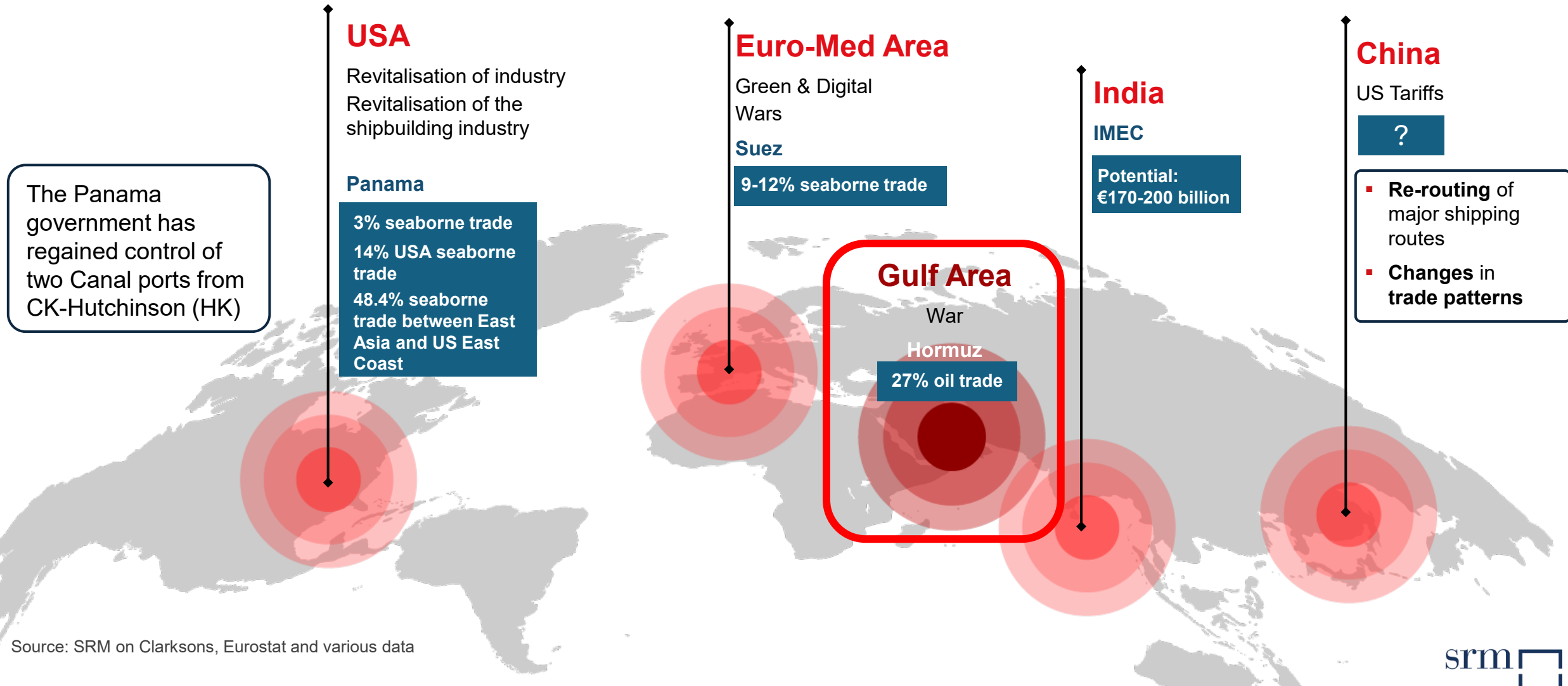
EVOLUTION OF  
STRATEGIC  
ROUTES AND  
TRADE CORRIDORS



THE ROLE OF  
PORTS AND  
LOGISTICS  
SYSTEMS

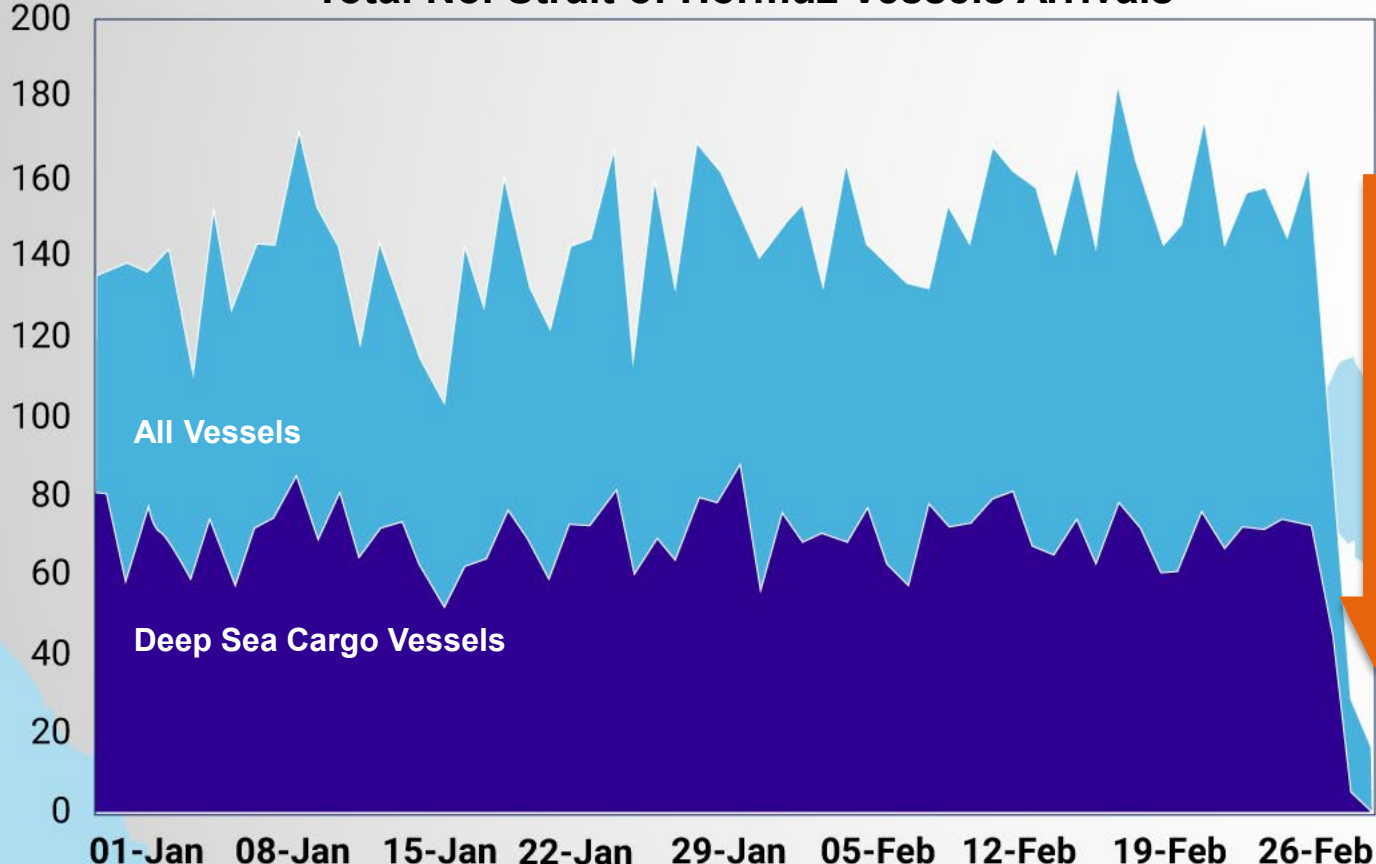
# 1 | Geopolitical overview

15% tariffs for all countries



# 2 | Sharp Decline in Vessel Traffic through the Strait of Hormuz

Total No. Strait of Hormuz Vessels Arrivals



Approximately 1,000 cargo vessels are stranded in the Strait of Hormuz

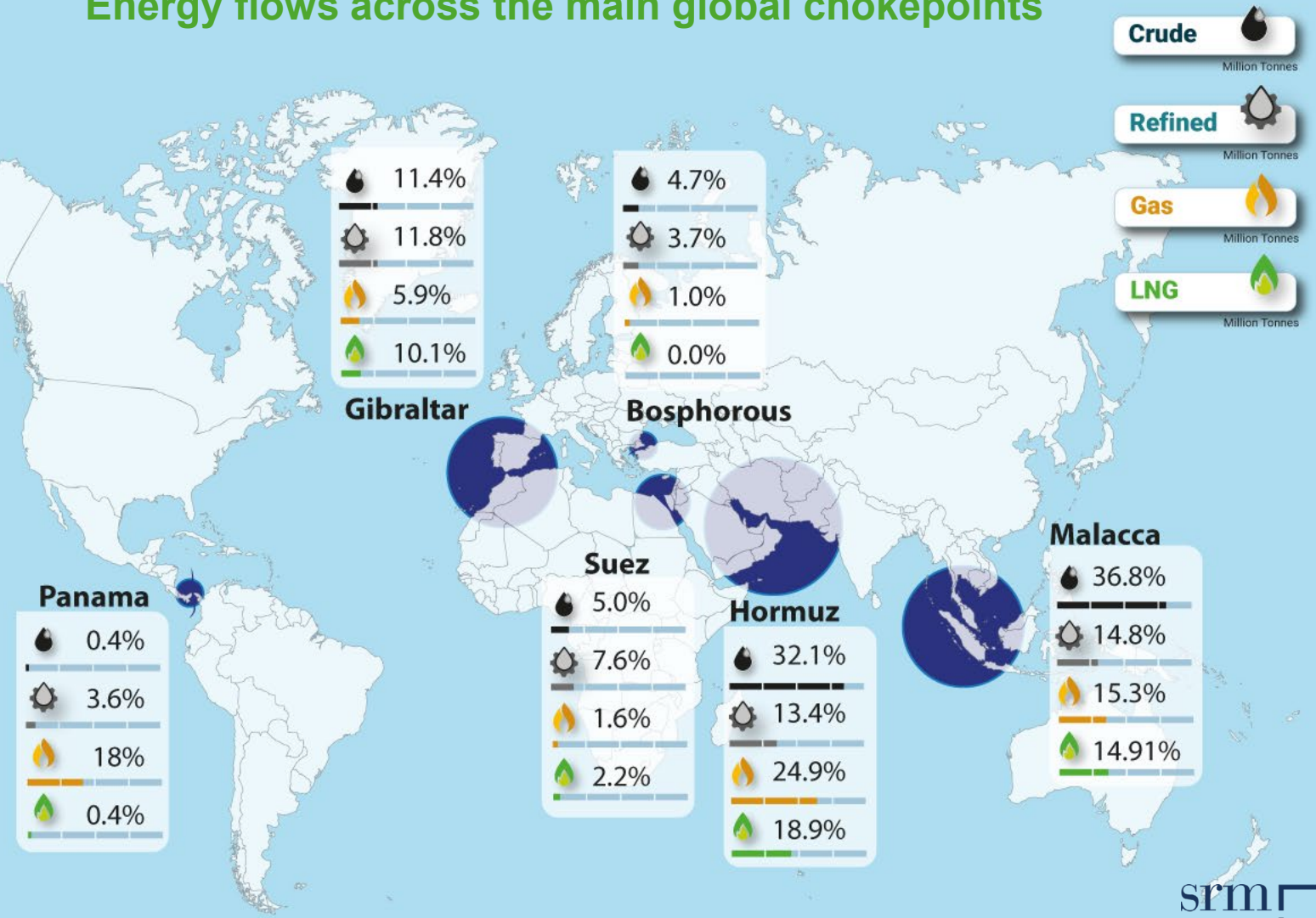
Vessel arrivals down by 90% from normal levels

Source: SRM on Clarksons

# 3 | Strategic Maritime Chokepoints and Global Energy Flows

- **Hormuz and Malacca account for 50%** of the **global maritime traffic of oil and gas**.
- About **29% of oil trade** (crude+refined) passes through the **Strait of Malacca**, and **25%** passes through the **Strait of Hormuz**.
- Strategically linking Europe and Asia, the **Suez Canal is crucial**. Crude, oil and gas transits through Suez have **increased** from 5.3% of oil products and 1.2% of LNG maritime flows of the last year to **7.6% of oil products trade** and **2.2% of LNG** currently.
- The importance of transit through **Gibraltar** is growing. LNG traffic transiting this Strait rose from 6.4% to 10% of the total.

Energy flows across the main global chokepoints



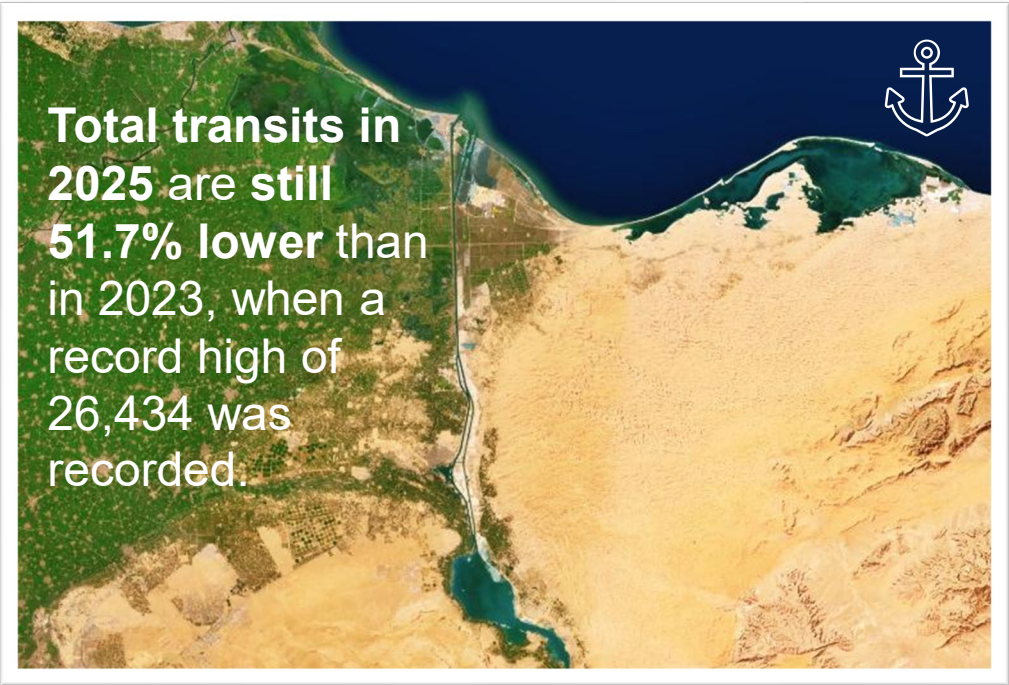
Source: SRM on Alphatanker

# 4 | Suez: a possible resumption... companies still do not feel safe

**2025:** Ship traffic through the Suez Canal fell by 3.4% to 12,758 vessels compared with 13,213 in 2024.

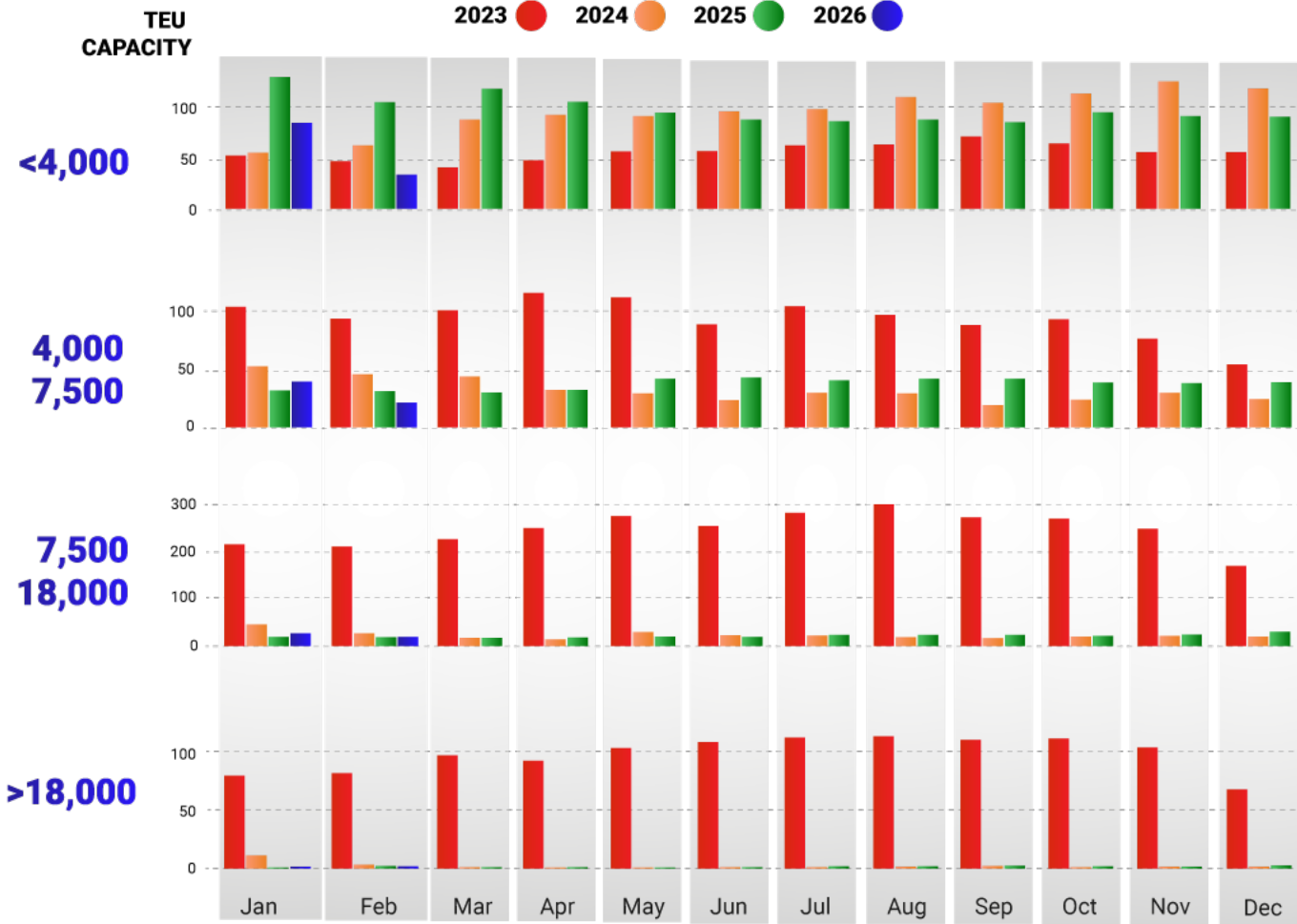
**Q4 2025:** 3,426 ships passed through the Canal (+9% increase on the same period the previous year), comprising:

- **1,330 tankers** (+ 13.5%)
- **2,096 other types of ships** (+ 6.4%), for a total of 145.5 million tonnes (+ 23.8%).



Source: SRM on SCA

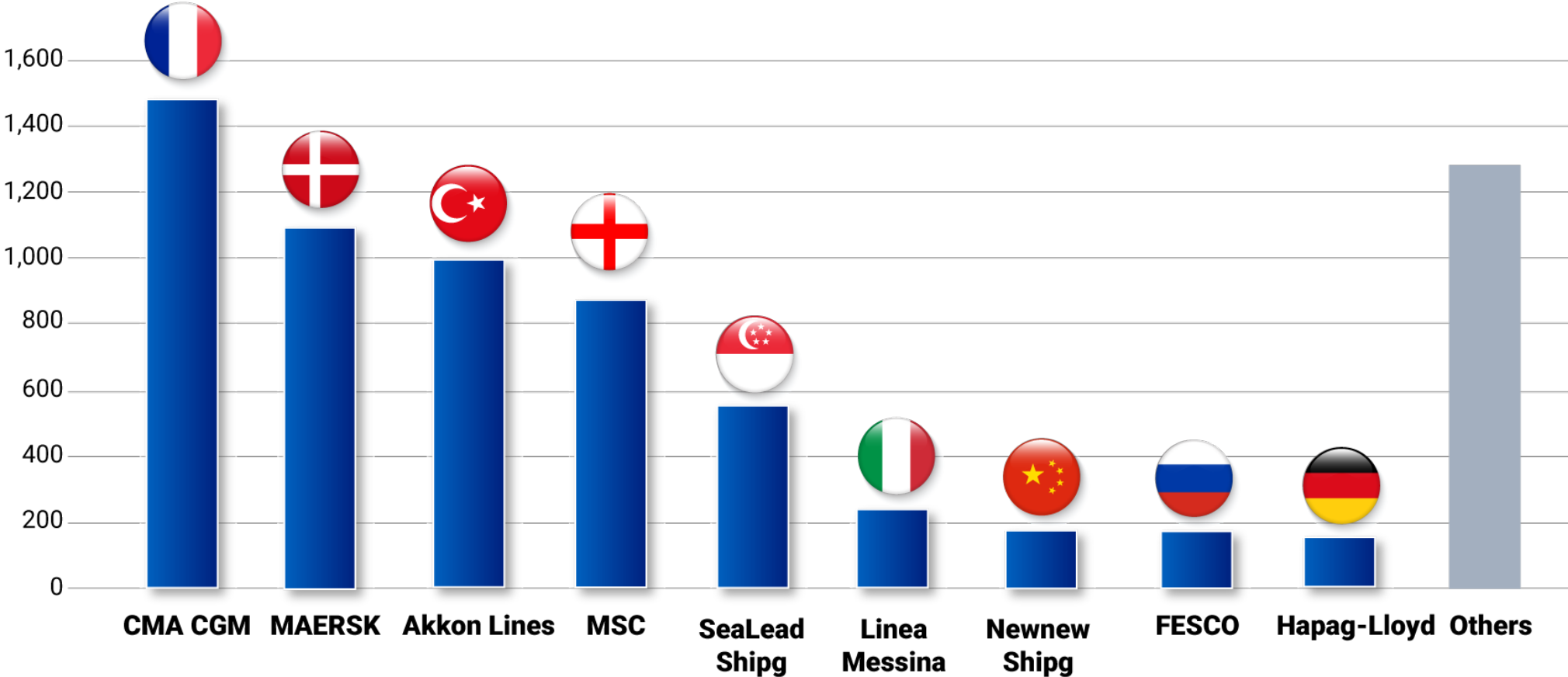
**Suez Canal Container Ship Traffic Year over Year**



Source: SRM on Alphaliner

# 5 | Main Shipping Players Transiting the Suez Canal

Suez Canal transits by carrier in 2025 (total thousand TEUs)



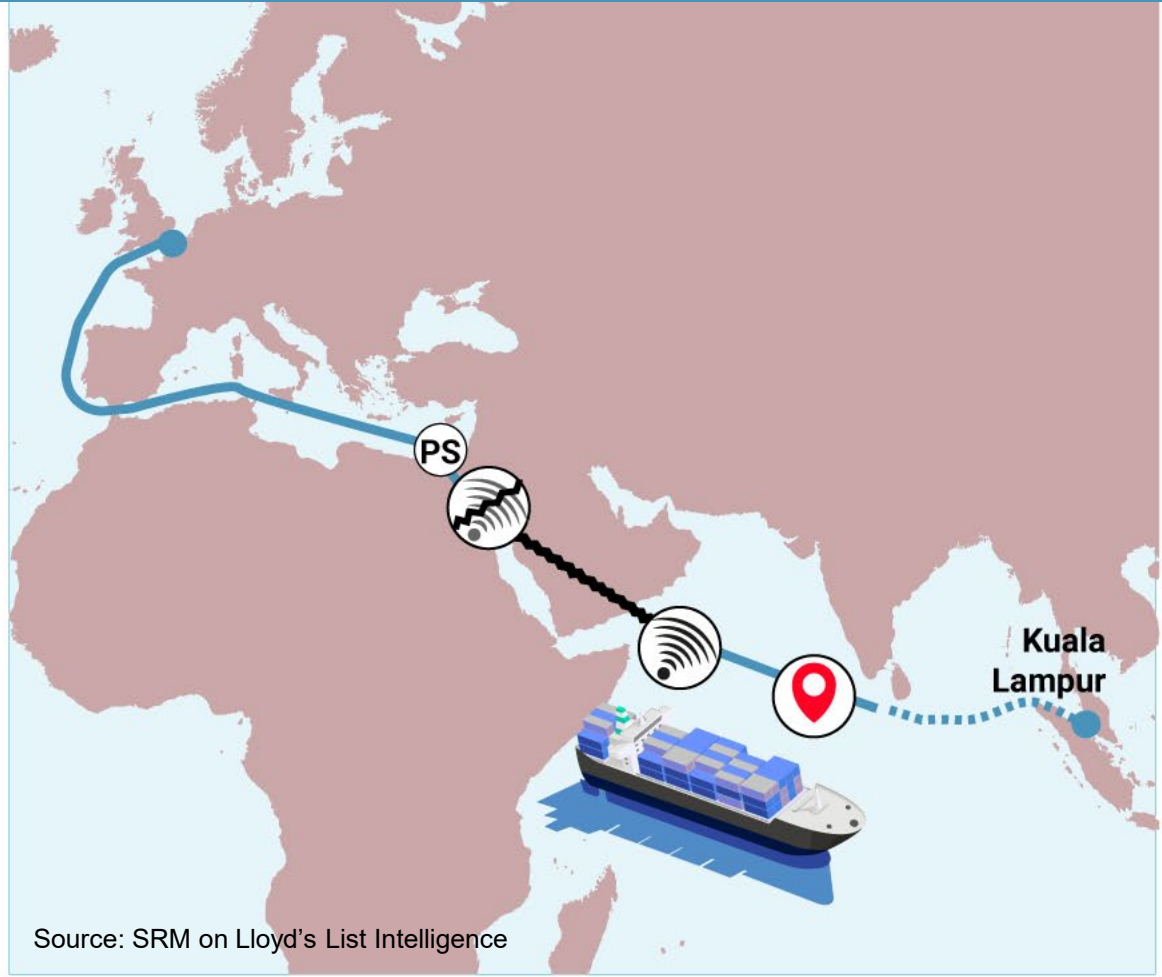
Based upon Alphaliner fleet and operator data, and AIS vessels movement information from 1 Jan to 4 Nov

# 6 | Emerging Alternative Routes: Arctic and 'Invisible' Shipping Lanes

Container ship *Istanbul Bridge International* transit voyage via the NSR

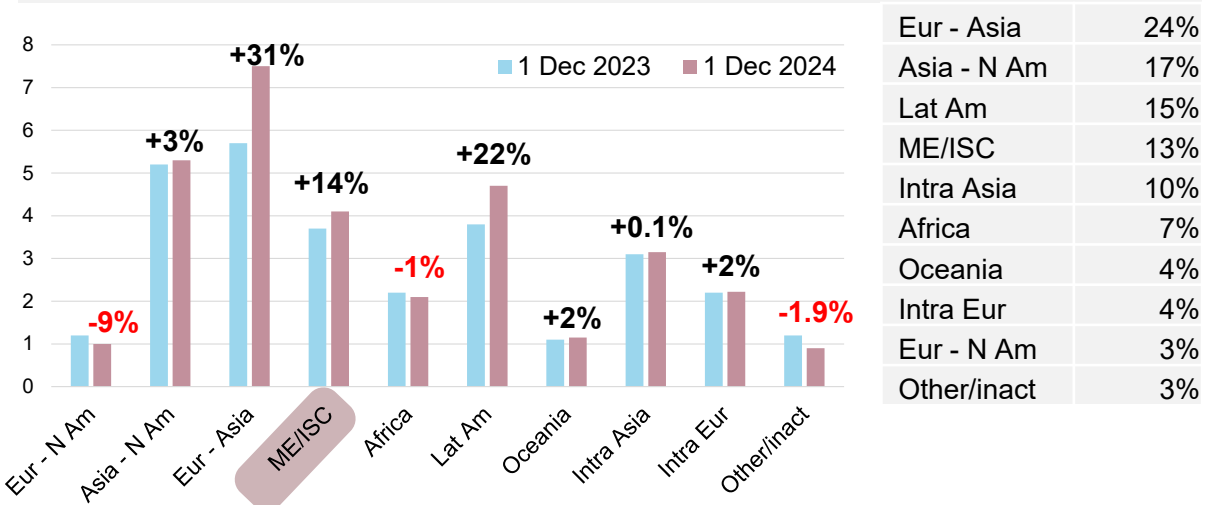


CMACGM *Benjamin Franklin* has entered the Arabian Sea after reactivating its AIS transponder near the entrance to the Gulf of Aden on November 7, following a six-day blackout



# 7 | The IMEC Corridor: a New Intercontinental Trade Network

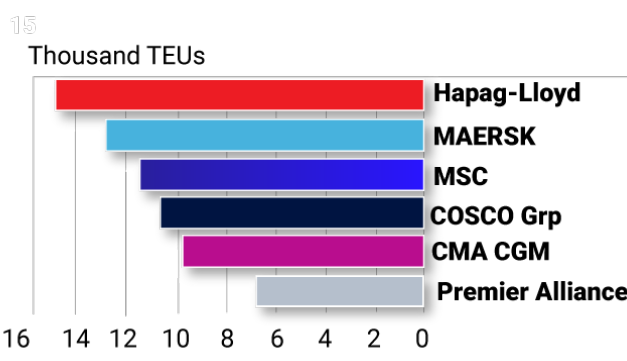
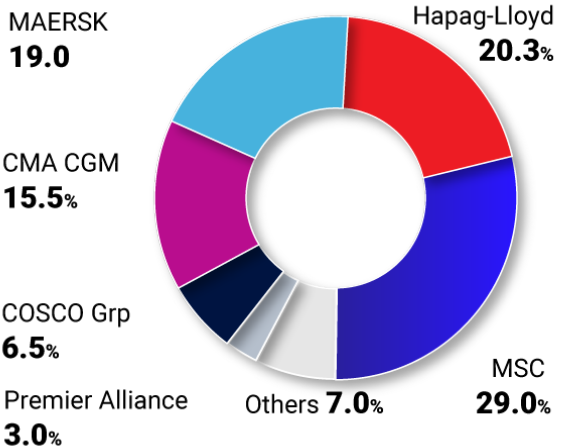
Global fleet deployment by trade (Mteu)



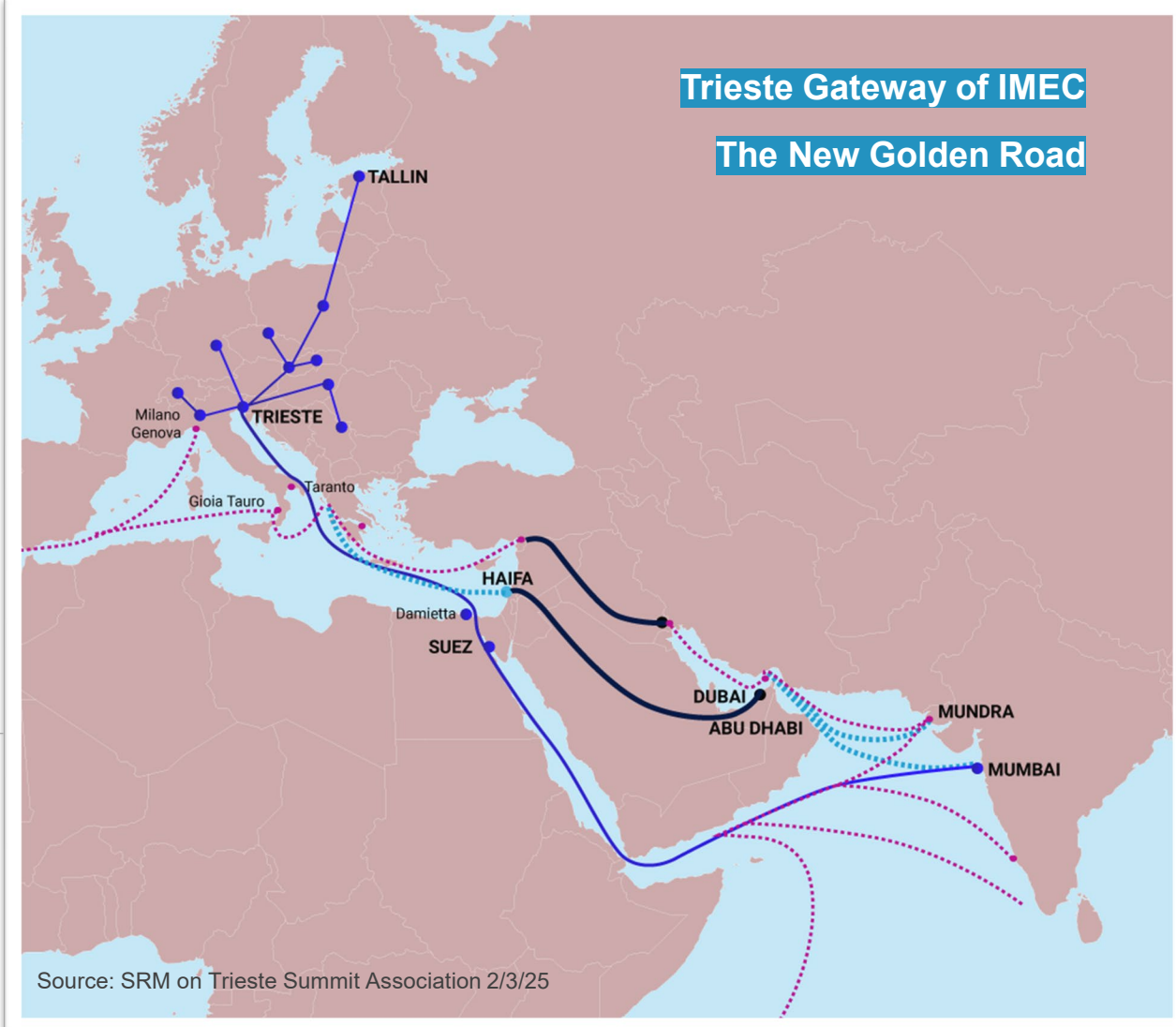
Eur - Asia	24%
Asia - N Am	17%
Lat Am	15%
ME/ISC	13%
Intra Asia	10%
Africa	7%
Oceania	4%
Intra Eur	4%
Eur - N Am	3%
Other/inact	3%

LH: Carrier market share on Europe-India loops\*  
RH: Projected average ship size

\*Dedicated loops. Premier Alliance members: ONE, HMM, Yang Ming

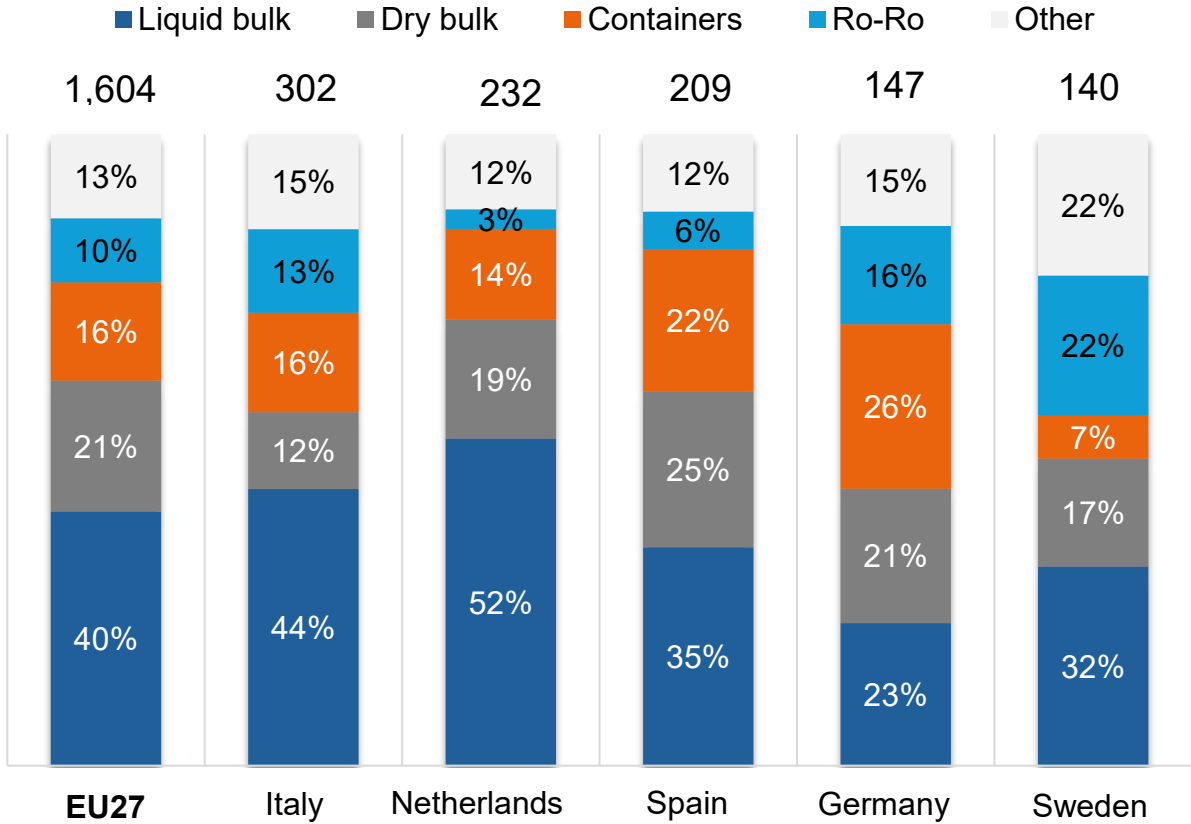


Source: SRM on Alphaliner

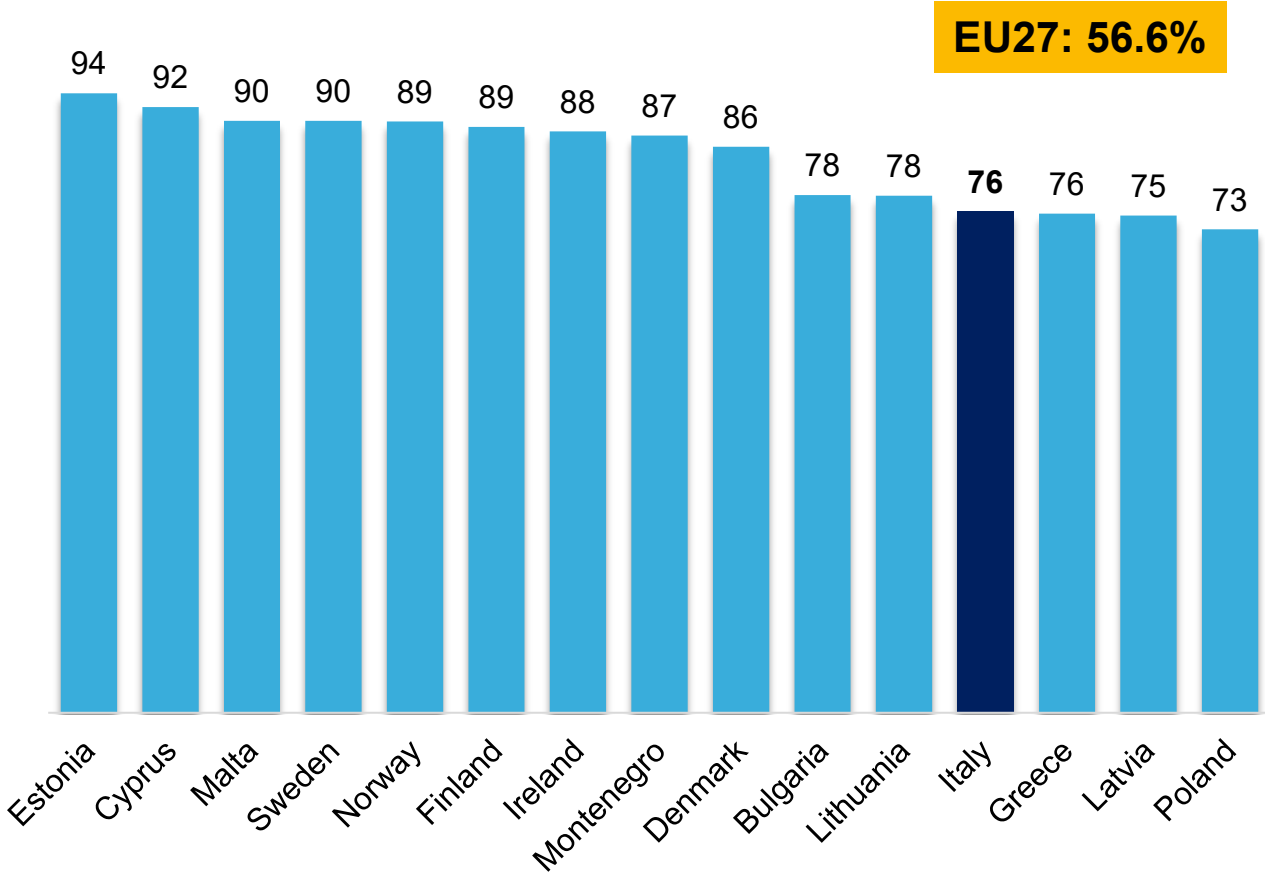


# 8 | Short Sea Shipping Trends in Europe

Short sea shipping of freight **by type of cargo** in the Top 5 EU countries  
(%, based on tonnes and mln tonnes)

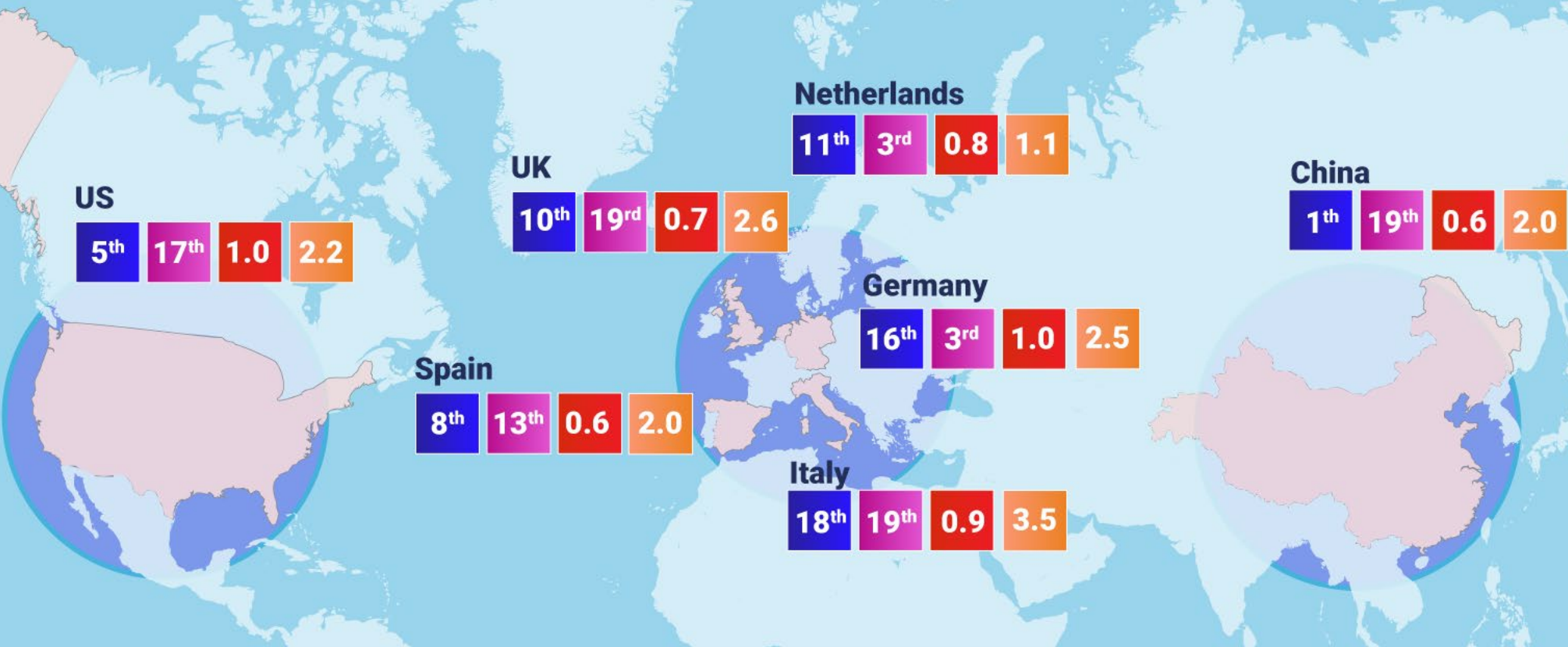


Short sea shipping of freight in total sea transport  
(%, based on tonnes)



Source: Eurostat, 2023

# 9 | Port Performance and Logistics Connectivity



LSCI Rank (Q4 2025)



LPI Rank (2023)



Time spent in port Container (day)



Time spent in port Dry Bulk (day)



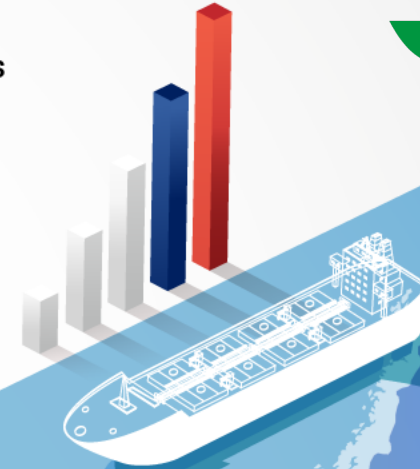
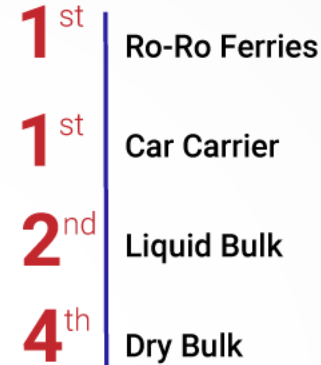
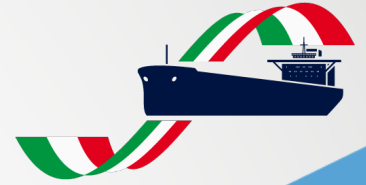
Source: SRM on Unctad and World Bank



# 11 | The Strategic Value of Italian Ports for EU

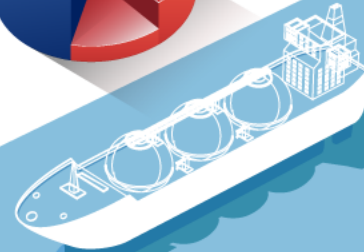
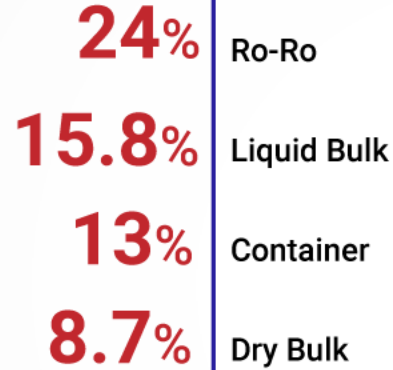
## Italian Shipping

**Fleet** (DWT ranking in EU 27)



## Italian Ports Traffic (Ton)

% of European Ports



## Italian Ports

**15%** of European Ports Total Traffic (EU 27)

## Italian Port calls

**21%** of European Port calls (EU 27)



## Italian Ports main figures

- ★ **Trieste** 1<sup>st</sup> European Port in the Mediterranean Area – SSS (Ton)
- ★ **Gioia Tauro & Genoa** 9<sup>th</sup> and 16<sup>th</sup> in the ranking of Container Ports in the Euromed Area (Teus)
- ★ **Genoa, Leghorn, Messina** are among the Top 10 European Ports for Ro-Ro traffic (Ton)

Source: SRM on Eurostat

## 12 | Conclusions

# 01

We are entering a new maritime era, where routes are no longer fixed, but constantly reshaped by global tensions and innovation.

# 02

The geography of trade is being rewritten — and those who anticipate change will define the future of global connectivity.

# 03

Ports and corridors are becoming the backbone of a new global order, where logistics is power.

Events like this - promoted by the Propeller Club – are essential to strengthen dialogue and cooperation between the Italian and UK maritime clusters – two of the most important in the world.



**Thank you for your attention**

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